

Case No.: 4:23-CV-00077-BO

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the exclusive buyers of our products and services. We focus on employee benefits brokers because of the way and manner in which our products and services are purchased – the majority of the time, our services are purchased through an employee benefits broker channel.

6. Most of our attribution comes through an employee benefits broker channel. This is typically how employee benefits buyers will buy products and services. A good way to understand how this system works is to look at health insurance. Companies have traditionally purchased health insurance for their employees through an insurance agent that provides the company with a package offering. Employee benefits brokers provide comparable services for companies who want to offer a wider breadth of employee benefits.

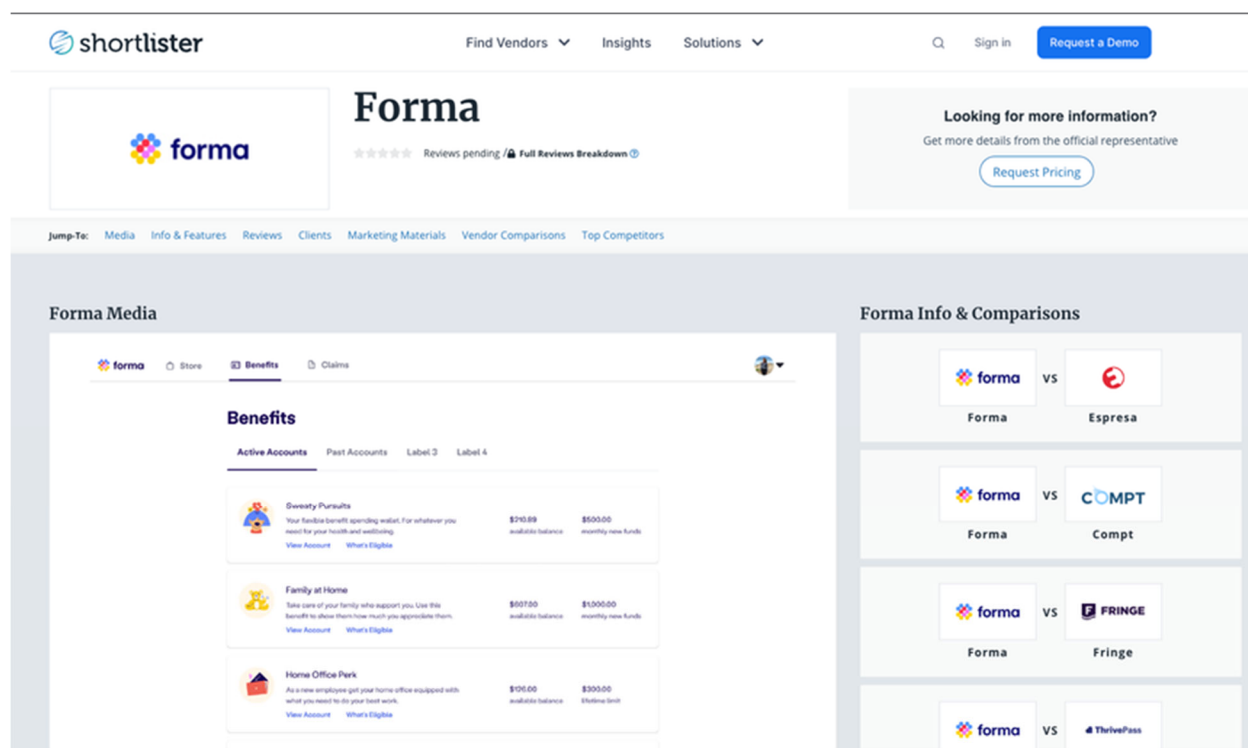
7. Twic sells products and services for employers to provide the employees with Lifestyle Spending Accounts (LSAs), Health Savings Accounts (HSAs), Flexible Spending Accounts (FSAs) and Health Reimbursement Accounts (HRAs). Twic does not sell products or services outside the employee benefits space. Twic does not, for example, sell sales compensation products or services.

8. A large part of my job is to generate awareness of our products and services with benefits brokers. Because companies typically purchase their benefits services through brokers, benefits brokers will make the business case to a benefits professional at a company about why that company should buy our products and services.

9. Because of the importance of benefits brokers in our industry, one of our top types of advertising and promotion is to maintain a presence on industry portals for benefit brokers. These portals are online platforms that are set up and maintained by the broker community. Brokers use industry portals to prepare for a Request For Proposal (RFP) for a company in need of benefits products and services. The broker will analyze what opportunities

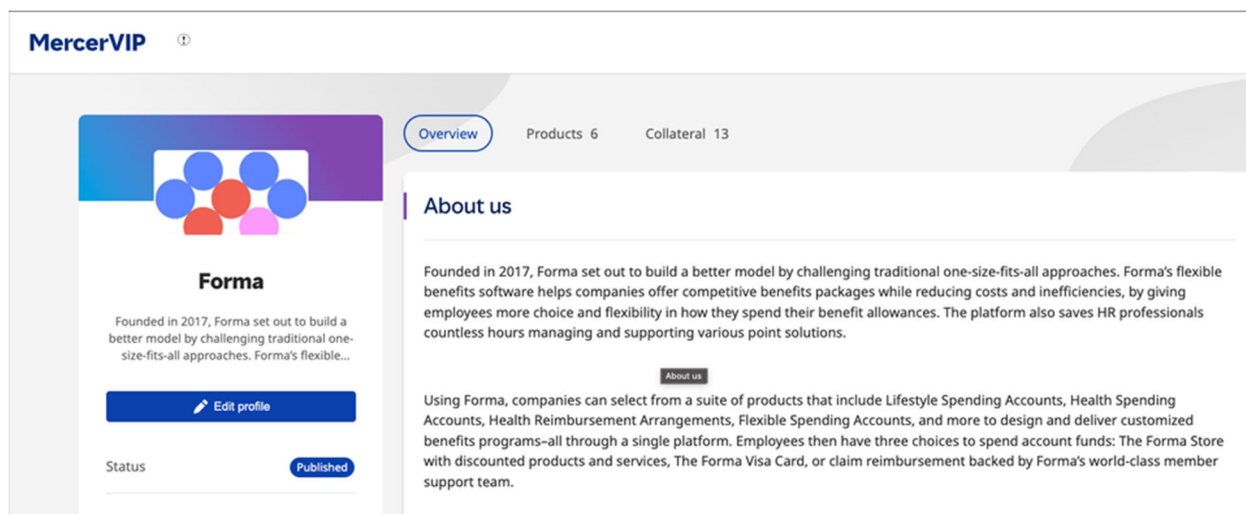
its potential customer may be eligible to participate in, and what offerings are appropriate to bundle for the benefits teams at that particular customer. As part of that analysis, the broker will typically review the information about different benefits companies and offerings through the industry portals.

10. Our presence on these benefit broker industry portals provides benefits brokers with clarification and details about what products and services we do and do not provide. Depending on the portal, we may be allowed to host content like product videos and brochures that provide additional details about our products and services. An example true and accurate screenshot from Shortlister, one of these platforms, is shown below.



This platform provides information about the types of benefits we offer, the features of our products and services, reviews of our products and services, examples of our customers, our marketing materials, comparisons between our products and services and other vendors, and who

our top competitors are. Another example is MercerVIP. A true and accurate screenshot of our profile on the MercerVIP portal is shown below:



This platform provides information about us, along with materials discussing our products and our company collateral. As shown in the screenshots, our presence on these portals includes our FORMA name and logo. Additional industry portals we participate in under our FORMA brand include, Benefits Ally, Business Group on Health, and BenefitPitch.

11. The benefits broker portals have capitalized on the opportunity for benefits companies to be front and center in marketing their products and services to brokers. Some portals are free, some are paid, and some provide a combination of free and paid features.

12. When I joined Twic, I modified how the company was spending money in advertising and promoting our FORMA products and services in order to increase our business performance. As part of this, we increased both our financial investment and our time investment on building our presence on these broker-specific portals.

13. In addition to digital advertising through the industry broker portals, Twic also maintains accounts on social media platforms under its FORMA name. The social media platform that we focus on the most is LinkedIn. LinkedIn is a business focused social media

platform. Businesses and business professionals are able to maintain profiles and communicate about their professional activities through LinkedIn.

14. We use two approaches to promote Twic's FORMA products and services through LinkedIn. One approach is to use paid advertising, which uses "account-based marketing." This means we direct our paid advertisements to a specific segment of LinkedIn users through a target account list. We would not get a good return on investment if all LinkedIn users received the paid advertisement. Instead, we want to go after our ideal customer profile whose business we would have the best chance to win. Our target account list has approximately 600 accounts representing benefits brokers and benefits professionals that we want to approach and target. We exclusively target our paid LinkedIn advertisements to those accounts.

15. The other approach to promoting Twic's FORMA products and services on LinkedIn is through organic social content. This means that we are able to make posts on our company page. We do not have to pay to make or update these posts. Our posts are then viewed by individuals who subscribe to or follow our company page. The people who are following our page are the same brokers and benefits professionals who purchase our products and services, as well as some of our investors and employees. True and accurate printouts of our FORMA LinkedIn Page from August 2023 are attached to my declaration at Exhibit A.

16. Twic also maintains social media pages under its FORMA name on Facebook (which includes Instagram), Twitter, and TikTok. Of these, we engage in paid, account based marketing on Facebook. We use organic posting on Facebook, Twitter, and TikTok.

17. When Twic posts organically on a social media platform, we may post original material or we may share material about our FORMA products and services that are posted by

others. We typically post more original content as compared to sharing content from others, but we do use both as part of our organic posting process.

18. Twic's social media posts are intended for our followers, who are mostly brokers and benefits professionals, but could include some of our investors or employees.

19. Another type of digital advertising Twic does under its FORMA mark is providing blog articles and ebooks about employee benefits. This content is written predominantly by my team and is intended to provide information about the various categories of benefits that our company provides. Our blog posts and ebooks are used to educate benefits brokers and benefits professionals on our products and services.

20. My team has written two eBooks: *The definitive guide for employee spending accounts* and *Lifestyle Spending Account best practices: 5 expert recommendations*. When we offer copies of these eBooks, they are typically offered as free downloadable resources through our website.

21. Examples of blog article topics include "How LSA benefits work"; "20 ways to find budget for Lifestyle Spending Accounts"; "Top 5 Lifestyle Spending Account benefits,"; "The top 25 employee benefits survey questions"; and "Flexible employee benefits: Point solutions vs LSAs." Blog articles are posted on our website at www.joinforma.com/blog. In addition to posting the articles on our blog, we will sometimes email blog articles to our mailing list. We may also link to the blog articles on our site in our social media posts. For example, the screenshot below shows an organic post from 2023 that we made on LinkedIn. The screenshot includes a link to one of our blog articles.



22. When I joined Twic, the company was working with a Public Relations (PR) agency to generate third party sourced content and coverage, particularly with the rebrand to FORMA. After I joined Twic, we decided that we were not going to invest in public relations anymore because it's an expensive budget item, because we do not get a good return on investment working with PR agencies, and because our budget is better used with the targeted social media advertising and with the benefits broker industry portals.

23. Prior to my joining Twic, Twic also did search engine marketing. Search Engine Marketing (SEM) is a method of placing paid advertisements on Google. SEM includes keyword advertising, where you bid to have ad placement on the search engine platform for a particular search term.

24. After I joined Twic, I turned off Twic's existing SEM campaigns. SEM is very expensive, and it is not as good at generating leads as benefits broker industry portals or targeted advertisements through LinkedIn.

25. SEM is different than Search Engine Optimization (SEO). SEM is for paid advertisements. SEO involves optimizing a website to try to get a certain type of placement in organic search results. SEO is not a form of paid marketing and promotion.

26. Twic optimizes its website so that its website is returned within the first three pages of organic (that is, not sponsored) Google results when someone conducts a search for the types of products or services we offer. The important terms we use to anchor our page are “flexible spending accounts,” “health savings accounts,” and “lifestyle spending accounts.” In other words, these phrases are the “root” of a search term. They may be coupled with additional terms – for example, the root “lifestyle spending account” could be combined with “software” or “administration,” which would result in the terms “lifestyle spending account software” and “lifestyle spending account administration.”

27. Although the majority of our advertising is digital, we do engage in some physical advertising. Our physical advertising is primarily trade show advertising. Examples of trade shows Twic attends are EHIR, WorlDatWork, HR Transform, Conference Board, PeopleTechPartners, The Corporate Wellness Institute, HR Tech, and UKG.

28. One example of a trade show we participate in is WorlDatWork – REWARDS. This is a trade show that targets benefits professionals from companies. Approximately 1000 people attend the show. Photographs of our trade show booth at WorlDatWork – REWARDS '23 San Diego are shown below:



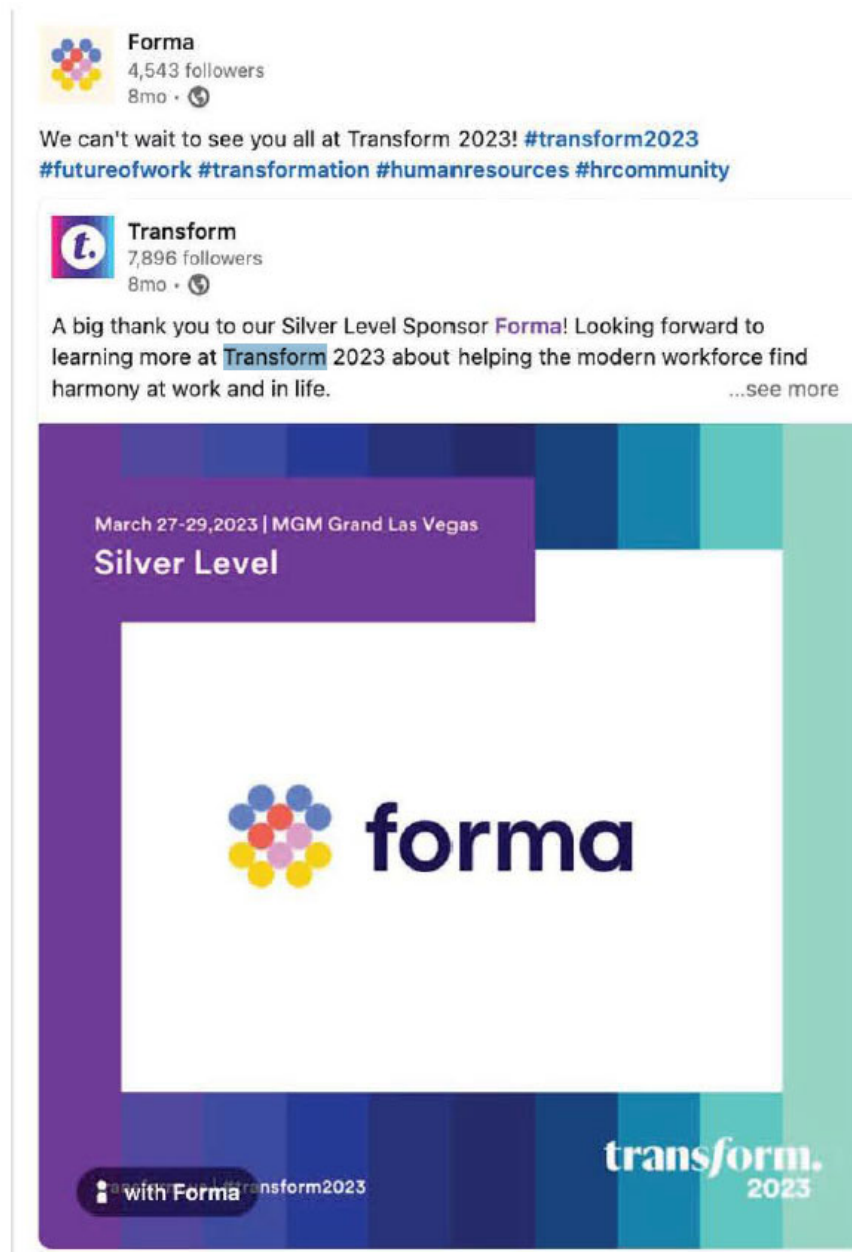
29. Another tradeshow we attend is Transform. Attached to my declaration at Exhibit B is a true and accurate copy of pages from the Transform website about the show. During the

2023 show, one of our company founders, Max Hsieh, was a show speaker. Some photographs from this show are shown below:



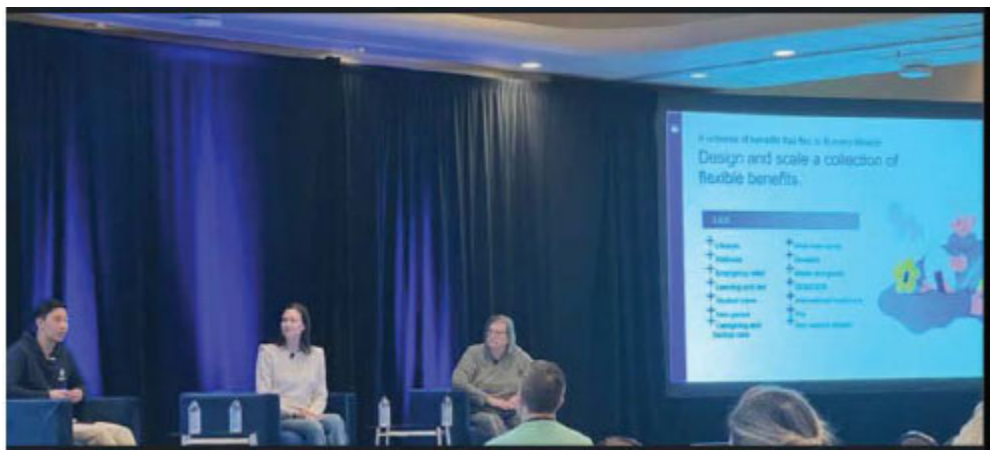
Twic, under its FORMA brand, was a silver level sponsor at Transform. As seen at Exhibit B, we were listed on the Transform website as a sponsor. Transform also promoted Twic, under the FORMA brand, as a sponsor on LinkedIn. A copy of our LinkedIn page sharing the post by Transform about our sponsorship is shown below. The original post would have been viewable

by, at least, the 7,896 followers of the Transform account, and the version shared by Forma would have been viewable by, at least, the 3,543 followers our LinkedIn account had at the time.



30. In addition to trade shows, Twic attends conferences under its FORMA brand. Examples of two of these conferences, the Corporate Wellness Institute and Conference Board's Be Well Conference, can be seen in Exhibit C to my declaration, which is a true and accurate

copy of a post from our LinkedIn account. The image below shows our CEO, Jason Fan, speaking at the Corporate Wellness Institute conference.



31. We also attend broker-specific events. These are events that are put on by the benefits brokers who sell our products and services. Examples of brokers who have specific events and invite us to attend to promote our FORMA products and services include Willis Towers Watson and Mercer.

32. We host lunch and learns for benefits brokers. These are exclusive to educating the broker and help them understand that by bringing us into their benefits portfolio, we will make their live easier and help them be more competitive for their customers. Our products and services are seen as disruptive to how benefits were traditionally administered, so we need to educate brokers about how they can take a former model of benefits administration and migrate that into a spending account model like ours. We would educate the brokers on what benefits are available as part of this model, how the programs are set up, the type of companies the broker would want to target with this model, and who is a good fit for our product and services.

33. Prior to joining Twic, I had not heard of “Forma AI, Inc.” or “FormaAI.”

34. As of the date of my declaration, I have not received any communications or inquiries that were intended for Forma AI, Inc.

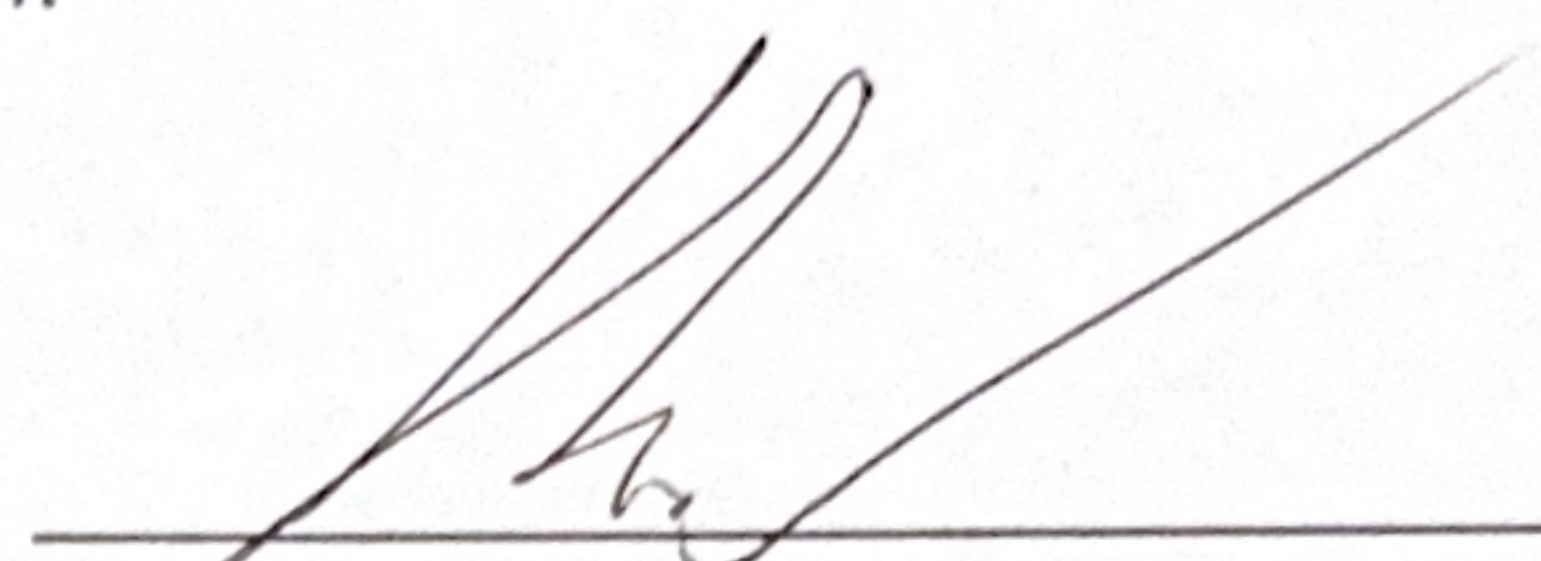
programs are set up, the type of companies the broker would want to target with this model, and who is a good fit for our product and services.

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34. As of the date of my declaration, I have not received any communications or inquiries that were intended for Forma AI, Inc.

I declare under penalty of perjury that the forgoing is true and correct.

Executed on this the 9th day of August, 2024.




Samuel Keninger

CERTIFICATE OF SERVICE


I hereby certify that on this the 9th day of August, 2024 a true copy of the foregoing **DECLARATION OF SAMUEL KENINGER** was filed with the clerk of court using the CM/ECF system, which will send notification by electronic mail of such filing to all counsel of record.

By: /s/ Emily M. Haas
Emily M. Haas
NC State Bar No. 39,716
4509 Creedmoor Road, Suite 501
Raleigh, North Carolina 27612
Telephone: (984) 220-8750
Facsimile: (877) 398-5240
Email: emhaas@michaelbest.com

Attorney for Twic, Inc.



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Series B

US\$ 40M

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0%

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1.6 year

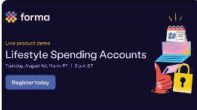
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Past events




Lifestyle Spending Accounts

Live product demo

Tue, Aug 1, 2023, 1:00 PM

4 attendees

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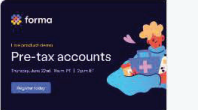


Forma & Guild WorldatWork Webinar: 3 Steps to Superchar...

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Overview

Forma (formerly Twic) is a life benefits platform that enables modern companies to design and scale flexible, global benefits programs with options that fit employee's lives, from health and wellbeing to lifestyle – and beyond.

Forma radically streamlines program administration and vendor integration across HR and Finance Teams, making flexible benefits easy to manage and delightful to experience.

- 1. Customize your program**
Select from a variety of ready-to-run life benefits programs that best match your strategy and global coverage needs.
- 2. Employees select benefits**
Employees can shop the curated marketplace for the benefits use their flexible spending account or simply file a claim—all in one fast and easy experience.
- 3. Track and optimize**
Powerful analytics provide insights to help your team track and optimize programs while our 24/7 Member Experience Team is there for your support when needed.

Website
<https://www.joinforma.com/>

Industry
Human Resources Services

Company size
51-200 employees
194 on LinkedIn


Headquarters
San Francisco, CA

Founded
2017

Specialties
Workplace Wellness, Employee Wellbeing, HR Automation, and Vendor Management

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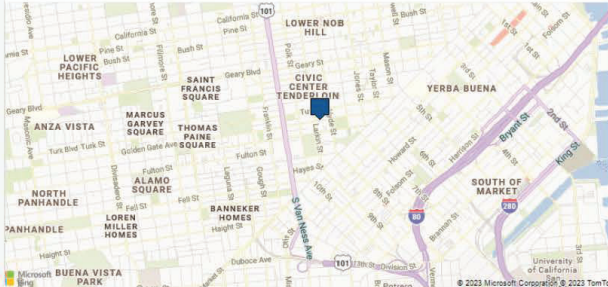
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What is Forma

The market for employee benefits is broken. Companies spend millions on employee benefits that employees neither value nor regularly use. Founded in 2017, Forma set out to build a better model by challenging traditional one-size-fits-all approaches.

Forma's flexible benefits software helps companies offer competitive benefits packages while reducing costs and inefficiencies, by giving employees more choice and flexibility in how they spend their benefit allowances.

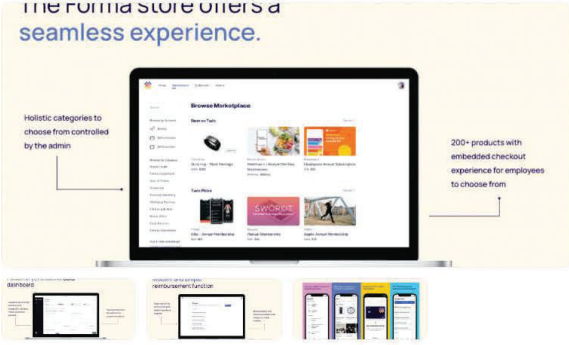
Using Forma, select from our suite of Lifestyle Spending Accounts, Health Spending Accounts, Health Reimbursement Arrangements, and Flexible Spending Accounts to design and deliver customized benefits programs available in a single platform. Employees then have three choices to spend account funds: The Forma Store with discounted products and services, The Forma Visa Card, or claim reimbursement backed by Forma's world-class member support team.

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
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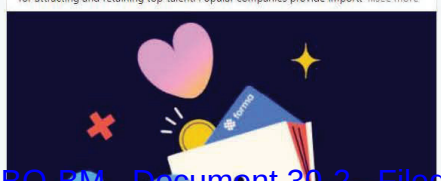
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In this interview, Canva's Global Head of People, Jennie Rogerson, shares ...see more



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Many companies offer some sort of food subsidy to support their employees. And, as the work model continues to evolve, finding ways to provide equitable options in and out of the office has become a bit tricky. (Not everyone's in office on a Fri ...see more

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Life at Forma




Meet our leaders




Jason F.
Founder | CEO



Max Hsieh
Cofounder & CTO




Leanne Pozzi
Manager, Enterprise Customer Success

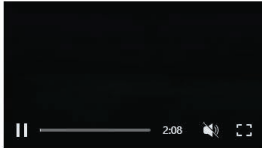


Misty Mountain
Head of People Operations

Interested in working with us in the future?

Not ready to apply or don't see a relevant open role? Privately share your profile with our recruiters – you'll be noted as expressing interest in our job openings for up to a year. [Learn more](#)





About Forma

Just like our world, today's workforce is changing. No longer confined to cubicles, conference calls, or commutes, we're more diverse and distributed than ever before. But, while companies are moving forward, employee benefits are falling behind.

Our benefits should flex to fit our lives, not the other way around. It's time to make the switch from one-size-fits-none to unique options for everyone.

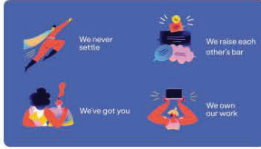
Our story

Our values

Forma is home to a growing team of bright minds. From engineers and executives to artists and technologists, our work is shaped by a myriad of passions and perspectives. Together, we're building better benefits that work for everyone.

Our blog

Our news and awards



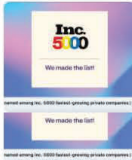



Our benefits

Just like our customers, our employees enjoy flexible benefits that bring harmony to work and life. From health insurance and PTO to yoga classes and retirement plans, we offer benefits that support our team inside of the office and out.

A few more of our 2022 Awards:
Top 100 on the Fortune Great Places to Work
Inc 500 Fastest Growing Private Companies

Our careers

Company photos

Employee testimonials



Nicholas James
Sr Software Engineer at
Forma

I am consistently impressed by the level of transparency and humility at Forma. The people here are hands down the most collaborative and generous I have worked with.



Jennifer Kim
Customer Success @ Forma

I wake up energized every morning knowing we're all in it to help build a great product and company. Our leadership puts a strong emphasis on culture and proactively recognizes and rewards hard work.



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194 employees

Where they live

140 | United States

54 | California, United States

40 | San Francisco Bay Area

23 | Taiwan

Where they studied

16 | National Taiwan University


5 | University of Washington

4 | UCLA

4 | Arizona State University

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People you may know



Patrick Souris · 2nd
Corporate Controller | Ex-Fast/Gusto/Zelle


Danielle Kasprzyk is a mutual connection

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Phoebe Manning · 3rd
Software Engineer

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John Kempe · 3rd
Recruiting Leader at Forma

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Vivian Ngo · 3rd
Senior Recruiter

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Jason F. · 3rd
Founder | CEO at Forma

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Peter Hadjisavvas · 3rd
Head Of Information Technology at Forma

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Max Hsieh · 3rd
Cofounder & CTO | Forma - We're hiring!

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Courtney Lechner · 3rd
C-Level Executive Assistant

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Jordan Pacello · 3rd
People Operations at Forma

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Michael Nathan · 3rd
Forma | Modern Lifestyle Benefits

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Jane Suttmeier · 3rd
Modern Lifestyle Benefits @Forma, MBA Candidate Johns.

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Engineering Manager


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Software Testing, Web Design,
Application Development, Custom...

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Lifestyle Benefits



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Lifestyle Benefits

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← Events


Upcoming events





Forma has no upcoming events planned


Past events


- 


Tue, Aug 1, 2023, 1:00 PM
Live product demo
4 attendees
- 


Tue, Jul 25, 2023, 11:00 AM
Forma & Guild WorldatWork Webinar: 3 Steps to Supercharge Employee
3 attendees
- 


Thu, Jun 22, 2023, 1:00 PM
Live product demo | Pre-tax Accounts
5 attendees
- 


Thu, May 25, 2023, 1:00 PM
How to modernize your HSA | Live panel discussion
47 attendees
- 


Wed, Apr 5, 2023, 12:00 PM
Analyzing the ROI of a flexible benefits program
62 attendees
- 


Thu, Mar 16, 2023, 1:00 PM
Forma's live product demo
15 attendees
- 

Tue, Feb 21, 2023, 1:00 PM
Forma's admin dashboard demo
6 attendees
- 

Thu, Jan 26, 2023, 1:00 PM
Forma live product demo
71 attendees
- 


Tue, Dec 6, 2022, 1:00 PM
Forma live product demo
5 attendees
- 


Thu, Dec 1, 2022, 12:00 PM
Forma office hours: How to transition pre-tax accounts
4 attendees
- 


Wed, Nov 2, 2022, 12:00 PM
Learn how Tripadvisor maximizes employee choices to win and grow together
6 attendees
- 

Tue, Oct 18, 2022, 1:00 PM
Forma Product Live Demo
6 attendees

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Sell everywhere online.
Connect your store to IG, Etsy, Google,
and more. See terms on site.
- 

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We need attorneys to help our legal
clients. Free trial to view cases.
- 

Criminal Justice Programs
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Bachelor's at Boston University.

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We believe in the power of human connection

to inspire people-driven business transformation

Transform sits at the forefront of the movement shaping the future of people-driven leadership. Through various channels of engagement, we are in a unique position to connect and inspire a broad community of business and people leaders to influence strategy, ignite innovation, and define what's next in the world of work. Learn more about our [recent transformation](#) →



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Mix with the influential voices of our ecosystem...



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CEO & Co-Founder
[Eventbrite](#)



Chip Conley
CEO & Founder
[Modern Elder Academy](#)



Kathryn Coleman
SVP of Talent
[3M](#)



Niki Pezeszki
General Partner
[Felicis Ventures](#)



Mala Singh
EVP & Chief People Officer
[Electronic Arts](#)



Sunaina Loh
Chief People Officer
[Marqeta](#)



Matt Oppenheimer
CEO & Co-Founder
[Remitly](#)



Mita Mallick
Head of Inclusion, Equity & Impact
[Carta](#)



Katelin Holloway
Founding Partner
[Seven Seven Six](#)



Ragy Thomas
CEO & Founder
[Sprinklr](#)



Beth Grous
Chief People Officer
[Tripadvisor](#)



Saydeah Howe
Founding Partner & Operating Partner
[Cherryrock Capital](#)

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Goldman
Sachs



Johnson & Johnson

Manulife



nextdoor



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GLOBAL

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We design unique and engaging experiences that fit right at the intersection of technology and the people transforming the workplace.

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“If we just take a step back and reimagine the world as it can be, things can be so much better. **Transform** takes those ideas of reimagination and puts them front and center.”



Uzair Qadeer
Chief People Officer
Carbon Health

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The following companies attended Transform 2023:

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01A	Daily Harvest	laapa	Oak3	Tailscale
3D Human	DailyPay	International	Oak HC/FT	take2.ai
Resources	Dassault Falcon	Headquarters	Octave	Takeda
3M	Jet Corp.	ianacare	Odyssey House	Talent
5AM Ventures	data.ai	ICONIQ Growth	of Utah	Acquisition
7wireVentures	Datapeople	Idealis	Offline Ventures	Group
500 Global	Data Quality	Idealist	Okera	Talent Board
A-List Events	Campaign	Consulting	Omada Health	Talentful
Abbvie	DataStax	IDEO	OMERS	TalentMinded,
Able Partners	DeAcero	IGT	Ventures	Inc
Abroad.io	DEEL	ILIA Beauty	Omna Search	TalentSpark
AbsenceSoft	Defiant	Impact	OneDigital	Talkspace
AbstractOps	Solutions LLC	Museums	Health and	Tangelo
Acadian	Define Ventures	Included.ai	Benefits	Tapplent
Ventures	Degreed	Inclusive Health	ONE EIGHTY,	Tatio
Accel	Delta Air Lines	InCommon	LLC	TCWGlobal
Accel	Delta Dental of	Indicator	One Medical	Teamable
Entertainment	California	Ventures	OneRange	Team Blind
Accolade	Delta Dental of	Infinite Equity	Ontra	Tech Elevator
ACME Marsh	Iowa	Initialized	Onward	Techstars
HR & Recruiting	Demand Local,	Capital	Opal Financial	Tekion
Consulting	Inc.	Inkhouse	Group	Corporation
Acorn Finance	Department of	Innovation	OpenAsset	Teladoc
Activr	Defense	Resource	OpenComp, Inc	Health/BetterHelp
Healthcare	Deputy	Center for	Operate Studio	Temporal
Adams Street	DHL Supply	Human	Ordergroove	Tennant Group
Partners	Chain	Resources	Org Clarity	Tent Partnership
Addition Wealth	Direct Federal	Insight Partners	Orgnostic	for Refugees
Adele Rom	Credit Union	insitro	Origin	Terkel
AdeptID	Direct	Instacart	Orum	Terminal
ADP	Recruiters Inc.	InsureTech	Osborne Clarke	Terrain
Advance Auto	Disclo	Connect	OTW	Analytics
Parts	Discord	Insynctive, Inc.	Oura Ring	Thatch
Advanced	Discreet Labs	Intactic /	Outgive Inc.	The Athena
Medical	Diverse	TechVerified	Outram	Alliance
Transport	Recruiting	Intern Scale	Research LLC	The Athletic
Advisor Group	Experts	In Transition	Outschool	The Bancorp
AECOM	DonorsChoose	Intro	Outsiders Fund	The Block
Affirm	Don't Tell HR	Invariantes	Overalls	theBoardlist
Agreed	DoorDash	Fund	Owen &	The Bregman
AIC (Middle	Doublefin	Invus	Associates -	Group
East)	DoubleVerify	Opportunities	Canada	The Gathering
Aimmune	Dovetail	ion Learning	Owen &	Effect
Therapeutics	Research Pty	Ironclad	Associates	The Grand
Airbnb	LTD	ishield.ai	OwlHub	The Huuman
Ajna	DriveWealth	Issuu	Owl Ventures	Group
AKASA, Inc.	dscout	IVP	Oyster HR	The Know
Akrivia HCM	Duetto	Jackpocket	P&G	The Mintable
Alachua County	Duolingo	Jamyr	Pac-12	The Mom
Alberta College	Dutchie	JFF Ventures	Conference	Project
of Paramedics	Ease	Jivox	Palantir	The PEER 150
Albertsons	Eastern	Corporation	Technologies	The Pittsburgh
Companies	Regional Co-	JLL	Pando	Foundation
Alera Group	ordinating	Technologies	Paper	The Ready
Alexander &	Council	Job Mobz	Paradox	The Rise
Baldwin	ECMC Group	Jobs for the	Parentaly	Journey
Alio	EHIR	Future (JFF)	ParkerGale	The Ryn Group
Allspring	Elastic	Johnsonville	Capital	theSkimm
AI Ventures	Electric AI, Inc.	LLC	Park West Asset	The Starr

Alt	Electronics Arts	JOON	Management	Conspiracy
Alteryx	Elevate	Joshin	LLC	The Wolff
Altruist	Leadership	Jumio	Pasito	Company
Alum: Google,	Ellen Meza	Jump Capital	Patagonia	Think Human
Lyft, Kiva	Consulting	Juniper Square	Patch	Thought
Amazon	Embark Trucks	Kaiser	Caregiving	Industries
Amazon Books	Ember	Permanente	PathMatch	thredUP
American	Emeritus	Kamarei	Patriot Angels	Thrive Digital
Student	Empathy	Advisory	Pave	Thumbtack
Assistance	EmpiricaLab	Kamarei	Pawp	Tide
American	EmployBridge	Advisory	Paxos	TiLT
Tradeshaw	Empower	Kandji	Paycom	Time By Ping
Services	Empowerly	Karat	Paycor	TLNT and ERE
Amplify	Emtrain	Katie Scott	Paylocity	Media
Amplitude	Enboarder	Consulting	Payscale	Tomorrow
Ana Flor,	Endo	Keep Financial	Pelora Stack	Health
ATTOM Data	Pharmaceuticals	Khan Academy	Peloton	TOOTRiS, Child
Solutions LLC	EngageRocket	Khosla Ventures	Pendo	Care On-
Andreessen	Enigma	Kiavi	People	Demand
Horowitz	Enjoyable Pain	Kickstarter	Analytics &	Torc
Anduril	of Growth	Kindred Minds	Future of Work	Torch
Industries	Academy	Kinkor	(PAFOW)	Toronto
Anthemis	Enspira	Consulting	People	Metropolitan
Anthill	Enthea	Klaviyo	Analytics	University
Anthos Capital	EON	Kleiner Perkins	Partners	(Ryerson
Anzu Partners	Epicenter-NYC	Knoetic	People Function	University)
Aon	Epoch	CPOHQ	People Leader	TotalEnergies
Apiary Life	EPOG Academy	Knowde	Accelerator	Nigeria Limited
Arcellx	EQ Community	Kohler Ventures	PeopleLens	TPG Rise
Aristeias	Eqtble	Kona	People Partners	TrainHQ
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ARTSY	Ethena	Wealth Advisors	PerfectTiming	Trust & Will
Ashby	Eventbrite	at UBS	Consulting	Truvelop
Aspire Talent	Everlaw	Ladder Life	Performetry	Turing School of
Asterias Health	Eve Was	(Listed 2x as	Performica	Software and
Astrid	Framed	Ladder/Ladder	Persona	Design
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Atomicwork Inc	Evolution/Mindfulness	Lafayette	Phononic	Capital
ATTOM Data	Matters	Square	Pillar	Turo Inc.
Solutions LLC	Evolution	Laguna Health	Pinnacle	TuSimple
Auburn	Evolution	Landed	Pinterest	Twitch
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Anywhere	Faire	Architects	Playground	Udemy
Avantus	Fair Food	Leapsome	Global	UKG
Axios	Network	Learnerby	PlayVS (Listed	unboXt, Inc.
Bain Capital	Fairmount	Learnit	2x as Play	UNCHAINED,
Ventures	Partners	Leeds Illuminate	Versus, Inc)	INC
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California	Fandom	Levenfeld	PNNL	United Business
Banff	FedChoice	Pearlstein	Polen Capital	Bank
Base64.ai	FederalCredit	LG Electronics	Postal	UnlearnAI
Bass Installation	Union	Liberate	Praisidio	Unlimited
Battery	Ferguson	Life360	Premier Talent	Unum
Ventures	Consulting	LifeGuides	Partners	Upful.ai
BD	Fetcher	LifeStance	Presence	Upload
Beacons AI	Fike + Co	Health	Prestige	Ventures
Bechtel	Finch	Lightspeed	Development	Upwork
Corporation	Findem	Venture	Group	Urban Outfitters
Become	FinFit	Partners	Production Glue	URL Media
Unmistakable	Finmagix	Lilt	Professional	Ursa
Before Noon	Fintros	Lingo Live	Sourcing	Consultants
Benchling	Fintual	Liveblocks	Solutions Inc.	USAA Savings
Benefex	Firmament	LLC Argo	Progyny, Inc.	Bank
BenefitBump	First Analysis	LLR Partners	Project Helping	UScellular
BenefitBump	First Nations	LUNA	PTC Exchange	Valence
Benson	Education	LOCAL	pumpspotting	

Benson	Steering	Localize	Pure	ValuesCulture
Executive	Committee	Lockton	Imagination	Vantage Data
Search	First Round	Companies	Studios	Centers
BEON	Capital	Loop & Tie	Purpose	Vargo+Lewis
BeSci Wellness	FitPros	Loop	Platform	VC Platform
Betr	Five to Nine	Los Angeles	Pyn	Global
BetterHelp	Flawless	Times	Quad Partners	Community
Betterleap	Flawless Recruit	Lovewell	Quantum	Veda Blossom
Betterleave	Flexspace	Hypnosis	Search Partners	Veeva
Bereavement	Technologies	Lulu and	QuestionPro	Velocity
BetterLesson	Flo Health Inc	Georgia	Workforce	Esports, Inc.
BetterUp	Flotek	Lumi	Quilted Health	Venero Capital
Better Ventures	Industries, Inc.	Lumos Capital	RAA Concepts	Advisors
Betterworks	Fluent	Group	Race Equ(al)ity	Verana Health
BHG Financial	Commerce	Lutron	Project	Verkada
Big Health	FNESC	Lyft	Radicl	Vertex Ventures
BiOptimizers	fodada	M13	Rain Instant Pay	VERTO
USA, inc.	Forma	MacArthur	RainyDayPal	EDUCATION,
Bizly	Form Energy	Foundation	Rancho	INC
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Blend	Motors	Venture Group	Community	Vette
Blend Me, Inc	Formerly	MagicLinks	College District	Vetty
Blind	Samsung	Malida Advisors	Randall	Veyl Ventures
Bling Capital	Research	Management	Advisory	Viewpoint
Blockchain.com	America	Controls, Inc.	Solutions LLC	Ventures
Bloom	Forshay Inc.	Marco	RavenPack	Villyge Inc.
Blueboard	FounderCulture	Experiences	RB Consulting	Violet
Blue J	Fountain	Margaret A.	RDCRS	VirgilHR
Strategies	Foxtrot	Cargill	RDS Capital	Virgin Orbit
BlueOwl, LLC	Fragomen	Philanthropies	Reach Capital	Visby Medical
Blue Shield of	Fringe	Marqeta	ReadySet	Visier
California	Front	MASS	Real	Vistra
BNY Mellon	FTV Capital	Precision, Inc.	Recalc	International
Bobbie	Full Circle	Mathison	Academy	Expansion
Bohemian	Full Swing Golf	MATH Venture	Recognition	Vitality Group
Innovation /	Full Umbrella	Partners	Media	Vivante Health,
Walking	Talent	Matterport	RecruitBot	Inc.
Meetings	Fundrise	Mattson	RecruitingDaily	Vivvi
Bolster	Fund That Flip	Technology	Recruiting from	VMG Partners
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Group	Gable	Cooper	Redica Systems,	WatchGuard
BOxD - Better	Galvanize	MDRT	Inc.	Technologies
Organizations	Climate	Medical	Redpoint	Webcor
by Design	Solutions	Solutions	Ventures	Web Hosting
Brace Software,	Gapsquare by	Medium	RedThread	Canada (WHC)
Inc.	XperTHR	Medley	Research	WeightWatchers
Branch	Garfield County	medZERO	Reed Smith LLP	Wellist
Bravely	Public Library	MeetCaregivers	Reel Train	WellSaid Labs
Bregal	District	Menlo Ventures	Refine Labs	Westwood &
Sagemount	Garner Health	Mentera	Reflective	Wilshire
Brex Inc.	Gatheround	MentorWorks	Management	When Insurance
BrightHire	Gem	Mentra	Refound	Agency
Bright Link	Gemini	Mercer	Reframe.Work	Whitman
Talent	Gene Gurkoff	Merck	Regal	Peterson
Brighton Park	General	Meta	Resources Inc.	WhoCo
Capital	Catalyst	Metcash	Regroup	Wieden+Kennedy
BrightPlan	Generate	MGM Resorts	Consulting	Wiegley
Brinqa	Biomedicines	International	(regroup.co)	Employment
Bristol Myers	Generus	MH WorkLife	Relativity Space	Law
Squibb	Georgian	Microsoft	Renegade	Wildbit
Brite	Gerber Life	Midi Health	Partners	Wing VC
Brite Benefits	Insurance	Mighty One	Rep Cap &	WisdomTree
Builders Vision	GHJ	Holding	Managing	WITH APP
BuildHR	Giant Eagle	Milk Stork	Editor	WndrCo
Consulting	Giant Machines	Millennium	Replicated Inc.	Woodruff
Built In	GitKraken	Alliance	Resilia	Sawyer
Bulldog DM	Globally Bold	Milo	Resquared	Workday
BuzzFeed	LLC	Mindful Growth	Restaurant365	Workera
Byteboard	Glue	Partners	Restaurant	Workflow
Calendly	GoFasti	Mirza	Brands	Worklytics
Calibrate	GoFundMe	MiSalud Health	International	Workplace
Cameron	Goldman Sachs	Mixlab	Revature	Accelerator
Camosun	America	Mizuho	Rework	Wellbeing

College	Goodpath	MobSquad	Riarh Advisory	Advisors
Campbellsville	GoodRx	ModelExpand	Partners	WorkReels
University	goodtrust	Modern Elder	Rightway	WorkTango
Campfire	GoPro	Academy	Rinse	WorkTech
Camsa	Gotham Growth	Modern Health	RISCO	WorkWeek
Canary Benefits	Gotham Image	ModernLoop	Riverwood	Worldwide ERC
Candor	Works	Modern People	Capital	WOVEN Human
Carbon, Inc	GoToro	Leader	RocketPower	Resources
Care.com for	GovOS	MojoHire	Rocky Mountain	Wrestling With
Business	GRAIL	Monte Carlo	Public Media	Talent
CareMax	Grand Canyon	Monument	Rosemont	XCELERATION
Carrick Capital	Trust	Morale Matters	Industries, LLC	XP Health
Partners	Gravitate	MoralesHR	Roundtrip	X The Moonshot
Carrot Fertility	Partners	Mosaic	Russell	Factory
Cart.com	Greater Green	Mosey	Reynolds	Yardstick
Catalight	Bay YMCA	Most Days	Associates	Zander Media
Foundation	Greenhouse	Motivosity	RW3	Zendesk
CAVU	Software	Mozilla	CultureWizard	Zenefits
Consumer	Greenlight	mpathic	Saalt	ZOMA Capital
Partners	Green Plains	MPCH and	Sageview	Zoom Video
Cayman Islands	Gremlin	Fraction	Capital	Communications
Airports	Greylock	MP Consulting	Salesforce	Zuora
Authority	Grief at Work	Mrbeast LLC	Ventures	Zus Health
Center for	Gritly	MRED	Salient Systems	
Effective	GritWell	Mubadala	Samantha Singh	
Organizations,	Growth by	Investment	Consulting, LLC	
University of	Design Talent	Company	Samsung Global	
Southern	Grow Therapy	Muckleshoot	Research	
California	Growth Path	Casino Resort	Samsung	
Centuro Global	GSMI	Multi-Health	Semiconductor	
Century	Guardian Life	Systems Inc	Samuel, Son &	
Therapeutics	Insurance	Multidisciplinary	Co	
Cepheid	Company	Association for	Sana	
Ceridian	Guild Education	Psychedelic	San Diego State	
Chainlink Labs	Guild Talent	Studies	University	
ChangeEngine	Guinness World	Multiplier	Sandra Garrett	
Charity Miles	Records	myKlovr	Search	
Charter	Gulf Relay	My Medical	San Francisco	
ChartHop	Gusto (Listed	Navigator	Forty Niners	
Checkr	2x"Guusto")	MyMosaic	Sanrekhana	
Chegg	GV (formerly	Mysten Labs	Sante Nasc,	
Chief	Google	Mystery	LLC	
Circa	Ventures)	N+1 Health	Santé	
Circle CI	Gympass	Ventures	Sapphire	
Citizen	H&H Healthcare	Nadel	Ventures	
City of Jackson	Advisers	Namecoach	Saskatchewan	
Civilian	Hala Systems	Napier Lane	REALTORS®	
Connections	Inc.	Associates	Association	
Clark Nuber	Handshake	Limited	Savant Growth	
CLASSUM	Happiest Baby	National	Sayge	
ClubHealth	Happyly	Veterinary	ScaleJOY	
Coa	Harbinger	Associates	Scope Zero	
Cobalt Ventures	Systems	(NVA)	Scribd	
Cocoon	Harness	NationsBenefits	Searchlight	
Collective Work	Harvard	Nav	Section 32	
and Place	Business	Nava Benefits	See & Free	
College of	Publishing	Navvisa Inc.	Consulting	
Chiropractors	Harvard Florens	NEA	SeekOut	
of Alberta	Harvard	NearWater	Segal Benz	
Collegewise	Innovation Labs	Growth LLC	Selma Finance	
Column	Hawaii	Newfront	Semgrep	
CommercelQ	Residency	Newmark	SemperVirens	
CommerceNext	Programs	Newsela	Venture Capital	
Community	Hawken School	Newzoo	Sempre Health	
Action	HDS Global	Nextdoor	Sensei Ag	
Partnership	Headspace	Nextpoint	Sequoia	
Compiify	Health	NFP	Consulting	
Complete.so	Headversity	Niural Inc.	Group	
Compt	Healthee	Nivati	ServiceNow	
Conexiom	HealthKick	Noble Schools	Sesh	
CONFIA	Healthworx /	Noble Talent	Seven	
Confirm	CareFirst	Northstar	Shaka Culture	
Confluent	Heartland	Northwest	Inc.	
Connected	Restaurant	School Division	Shared_Studios	
Commons	Group, LLC	Norwest	ShareMy.Health	
Conomy	HumanSoft	Venture	Shelby Wolpa	
MESH	Heffernan	Partners		

Contentful	Insurance	NotedSource	Consulting
Continuum	Brokers	Notion	SherpaScore
Coordinape	Heidrick &	Nowsta	Shine Capital
Costanoa	Struggles	NudgeLabs	Shopify
Ventures	Helbiz	NVA/Compassion	Siemens USA
Countable	HelmsBriscoe	First	Signifyd
Cover Genius	Hermeus		Silgan
CRA/Admired	Hewlett		Containers
Leadership	Packard		Silver Lake
Creative Talent	Enterprise		SimpLee
Endeavors	Hey Jane		Healthcare
CreatorIQ	HeyMirza Inc		Singular
Credit One	HiBob		Genomics
Bank	High Alpha		Sionna
Credit Union of	Highway		Therapeutics
Colorado	Benefits		Sisu Data
Credo	Hilo Medical		SJ Startup
Semiconductor	Center		Solutions
Crossbeam	Hilti Fieldwire,		SkillKeepr
CrowdStreet	Inc.		SKIMS
CrowdStrike	Hims & Hers		SLAC
Crunchbase	Health		Slate Advisers
Crunchyroll	Hinge Health		Smallpdf
CSHRP -	Hint Connect		SmartRecruiters
Community for	hireEZ		Smile
Strategic HR	HireSweet		Snooze, an AM
Partnership	HiRoad		Eatery
Culture Amp	HM.CLAUSE		Snorkel AI
Curology	Hone		Socotra
CVC	Honor		Softbank Vision
	Horsefly		Fund
	Analytics		Solidcore
	Host Hotels &		Solidigm
	Resorts		Technology
	Houston		Sony Music
	Methodist		Publishing
	Corporate		Soundwise,
	Division		Native
	Houzz Inc.		Instruments &
	HRD America		iZotope
	HR Geckos		Sourcegraph
	hrQ		Sparrow
	HR Search		Spokn
	Experts, Inc.		SPORTLOGIQ
	HRT		Springbank
	Hubspot		Collective
	HUDDL3 Group		Sprinklr
	Hudson River		Sprng
	Trading		Sprout Travel
	Human Capital		SRBeyond LLC
	HumanityWorks		Startup Talent
	Human		Consulting
	Longevity, Inc.		Stash
	Human		Steele Intranet
	Resource		T/A DPI
	Executive		Partners Limited
	Magazine		Stellar
	Human		Development
	Ventures		Foundation
	Hummingly		Stephanie
	Hungryroot		Lemek LLC
	Hyde Park		Sterling Knight
	Venture		(Singapore)
	Partners		Stoke Talent (a
			Fiverr company)
			StoryBuilt
			Strada
			Education
			Network
			StrandFive
			Executive
			Leadership
			Coaching &
			Development
			Strava
			Striking

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Stripe
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strongDM
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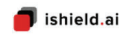


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Speakers


Transform 2023 featured three days of keynotes, roundtables, fireside chats, demos, and workshops from nearly 300 of the leading minds in the future of work ecosystem.




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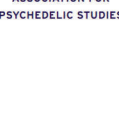
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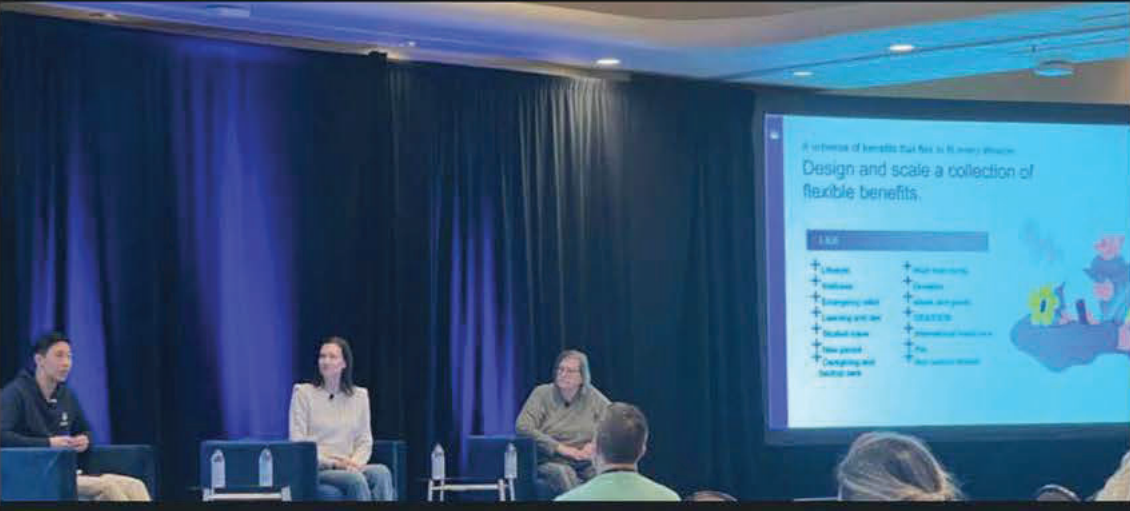
Formies attended two conferences this week! Our very own **Jason Fan** took the stage with **Annie Itsell** of **Oscar Health** at the Corporate Wellness Institute in Pasadena to discuss the ROI and business impact of investing in lifestyle spending accounts. They also discussed how LSAs enhance employee experiences by offering a wide range of options that tailor to every lifestyle and removes point solution fatigue from employers.

We also are at Conference Board's Be Well Conference discussing how LSAs offer a new level of flexibility and choice for employees with Annie Itsell (double duty this week, Annie!) and **Sheila M. Krueger (she/her), MBA, CCP of Zoom**.

Were you able to attend either of these speaking sessions? Let us know!

Crandall Kermott Ben Thompson Kevin Drucker

#healthandwellness #forma #lifestylespendingaccount #employeebenefits



The photograph shows a panel discussion on a stage. Three people are seated on a stage in front of a large screen. The screen displays a presentation titled "Design and scale a collection of flexible benefits" with a list of LSA options. The audience is visible in the foreground.

LSA	
Life insurance	Health insurance
Disability insurance	Dental insurance
Emergency care	Prescription drug coverage
Long-term care	Voluntary COBRA
Short-term care	International health insurance
Long-term care	Life insurance
Disability insurance	Health insurance
Emergency care	Dental insurance
Prescription drug coverage	Voluntary COBRA